

The MX-Contact Marketing Module Overview



www.mxcontact.com

The complete Customer Relationship,
Contact Management
and
Sales Automation System
for
Microsoft Outlook

ExchangeW!se

MESSAGING, COLLABORATION AND CRM SPECIALISTS

Table of Contents

1	Introduction	1
2	Direct Marketing & Response Management	1
2.1	Company/Contact Views	1
2.2	Standard Outlook Mail Merge.....	2
2.3	Word Mail Merge	2
2.4	Direct e-Mail	5
2.4.1	Distribution Lists	5
2.4.2	Mail Merge	5
2.5	Word Mail Merge	5
3	Event Management	6
3.1	Events/Functions.....	6
3.1.1	Event Types	6
3.1.2	Event Details	7
3.1.3	Attendees	8
3.1.4	Suppliers/Sponsors	10
3.1.5	Speakers/Lecturers	10
3.1.6	Costing	11
3.1.7	Response/Attendance Tracking	12
3.1.8	Tasks.....	12
3.1.9	E-Mail	13
3.1.10	Documents	13
4	Campaign Management	13
4.1	Campaign Details.....	13
4.1.1	Campaign Details.....	13
4.1.2	Summary.....	13
4.1.3	Costs	14
4.1.4	Associated Campaigns.....	15
4.1.5	Associated Events.....	15
4.1.6	Documents	15
4.1.7	Associated Companies.....	15
4.1.8	Associated Contacts.....	15
4.1.9	Associated Users/Teams	15
4.1.10	Journals.....	16
4.1.11	Tasks.....	16

4.1.12	E-Mail	16
4.1.13	Opportunities	16
4.1.14	Orders	16
4.1.15	Return on Investment Analysis.....	16
5	Surveys	16
5.1	Survey Templates	17
5.2	Company Surveys.....	18

1 Introduction

The purpose of this document is to give an overview of some of the functionality that is available in the Marketing Module of MX-Contact.

The Marketing Module consists of 3 main components:

- Event Management
- Campaign Management
- Surveys

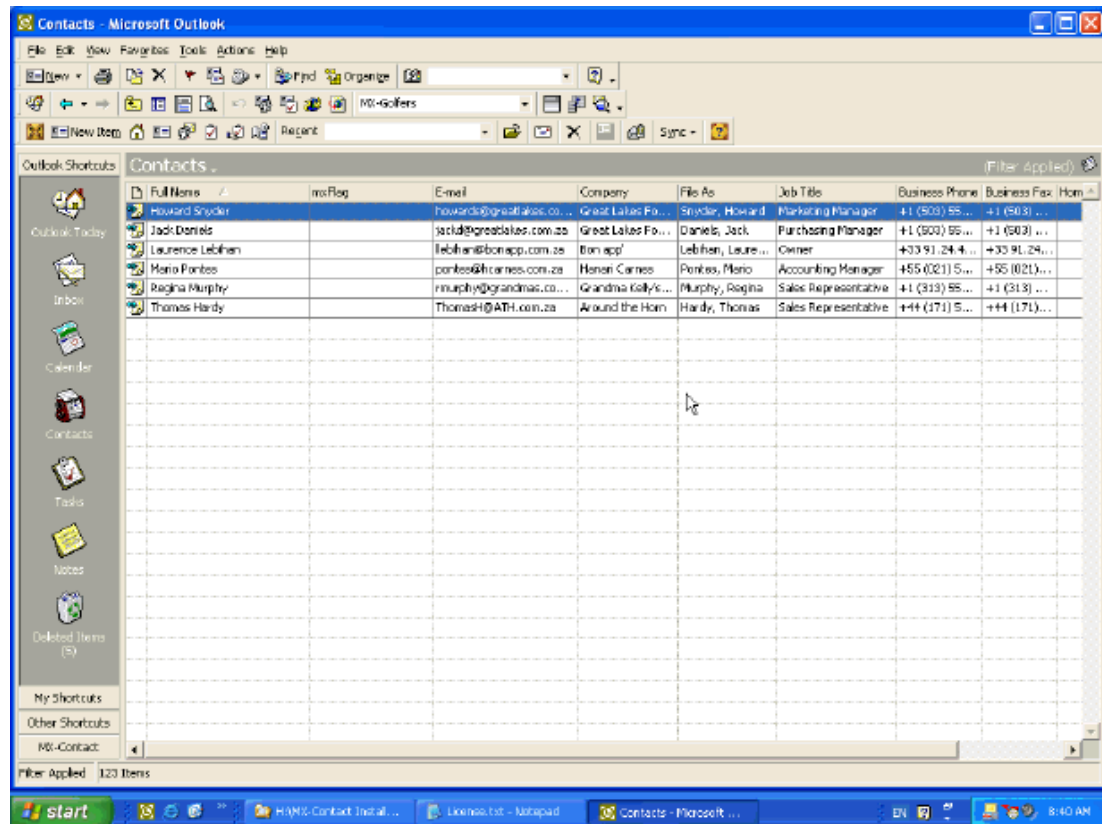
The Base System of MX-Contact includes the facilities to produce personalized direct mailings or e-mail shots. These facilities are also included here because of their applicability to the other Marketing-Module specific features.

2 Direct Marketing & Response Management

2.1 Company/Contact Views

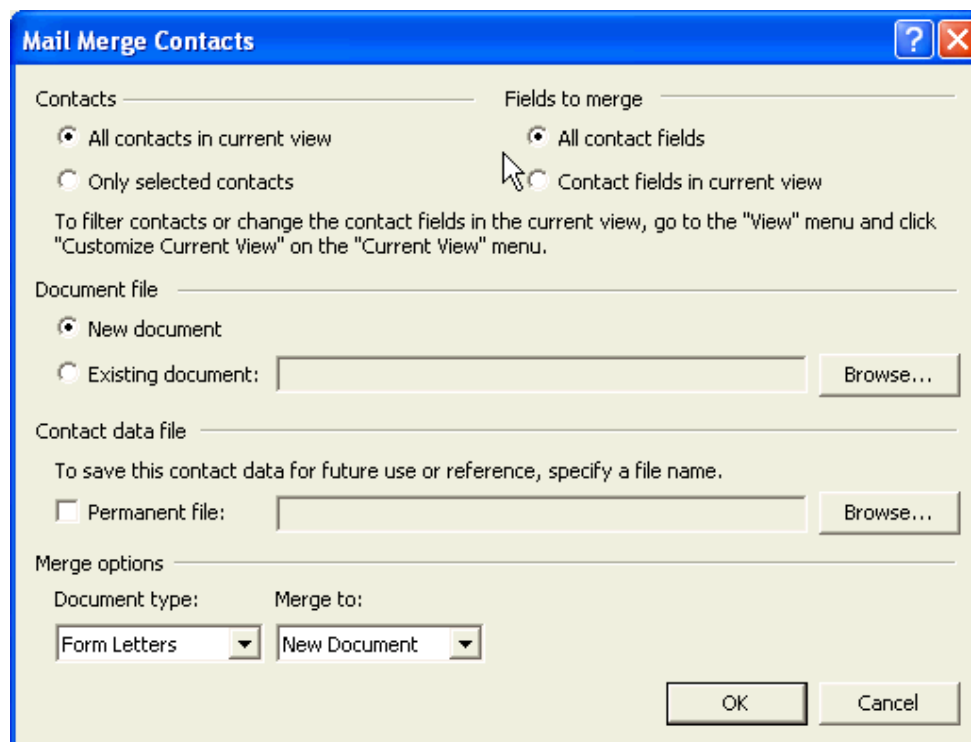
The facility exists to define 'views' of Companies and Contacts that display filtered subsets of the database, e.g. all 'Customer' Companies, all 'Golfer' Contacts, etc. These views can then be used as the Target Base for a mailshot/campaign.

Shown below is an example of the Golfers view on the Contacts folder:



2.2 Standard Outlook Mail Merge

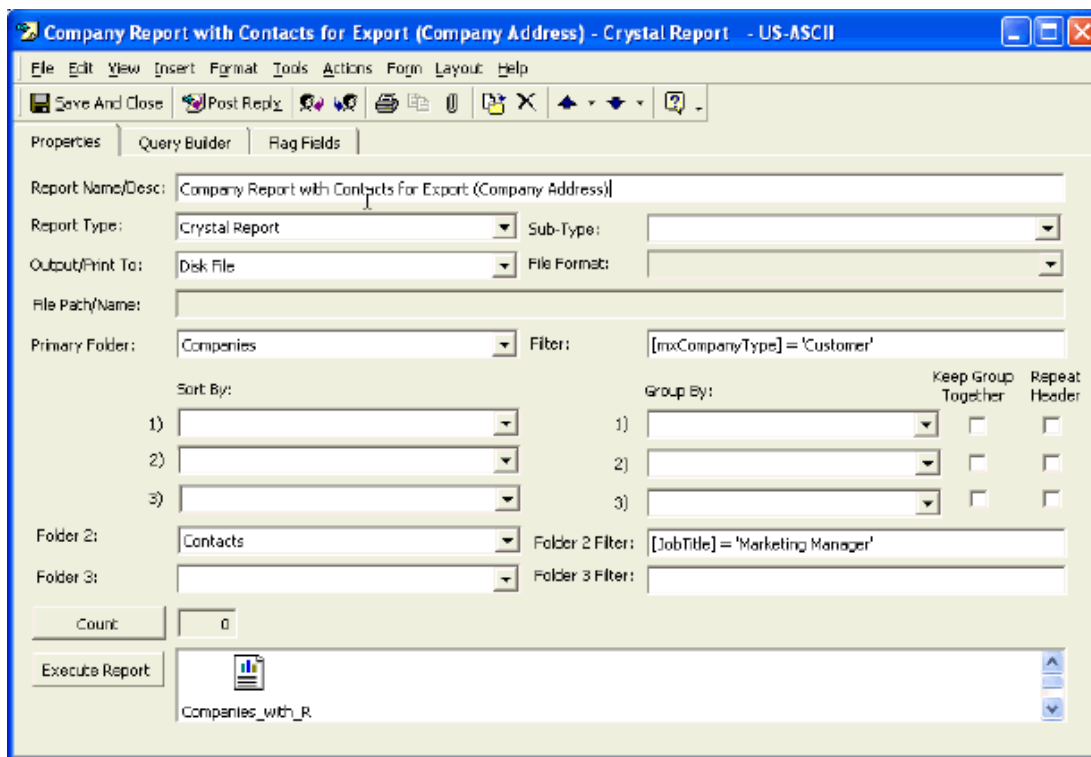
You can use MX-Contact contacts as the data source to create a variety of merged documents in Microsoft Word, and you can begin your mail merge from Outlook. You can create form letters, print mailing labels, or print addresses on envelopes. You can also send bulk e-mail messages or faxes to your contacts.



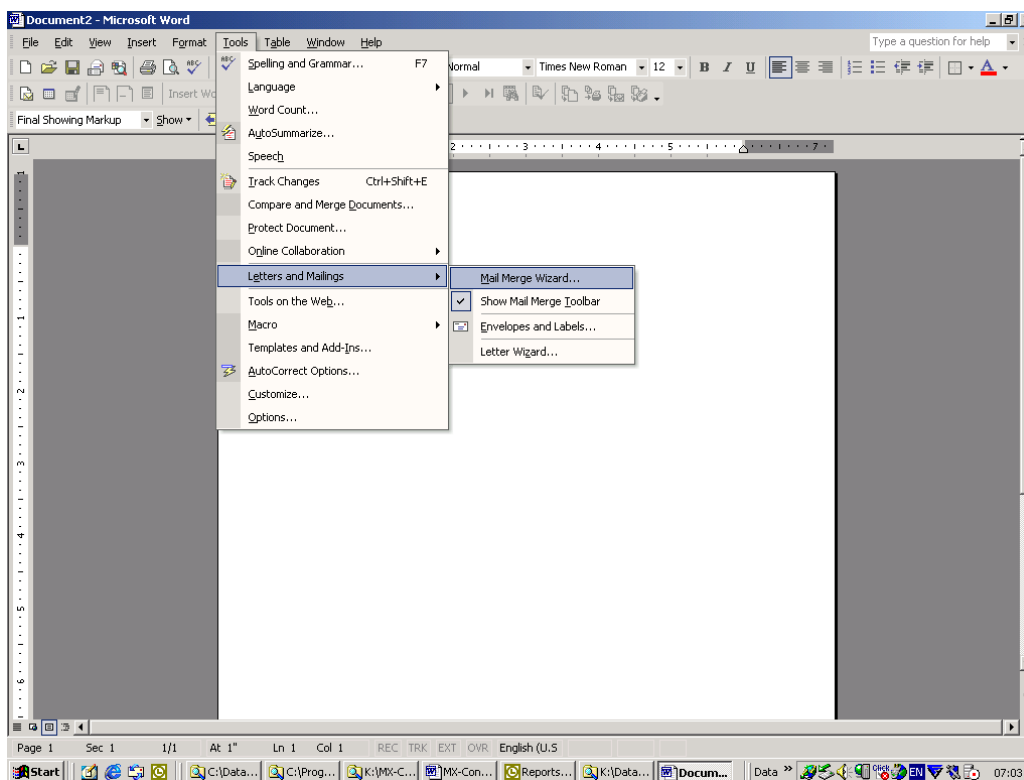
2.3 Word Mail Merge

There are many situations where your target contact list must be filtered against criteria from more than one folder. An example is where you need to say send a letter to all the Marketing Managers (Contact Job Title= 'Marketing Manager') of all your customers (Company Type = 'Customer').

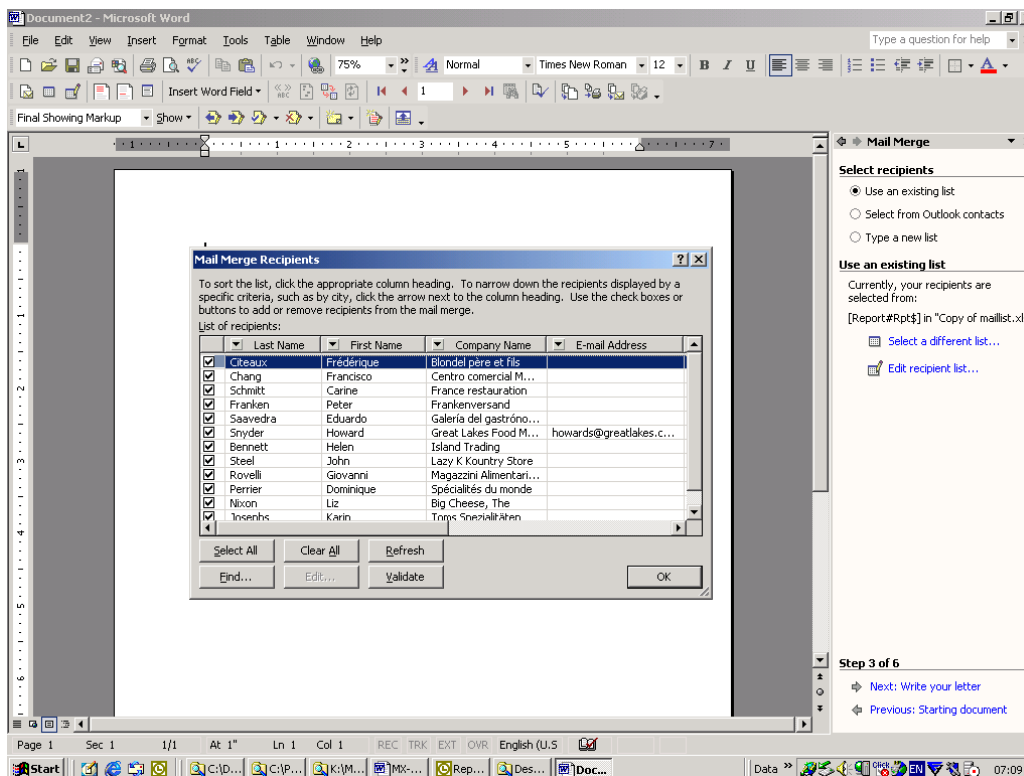
To handle this situation you use MX-Contact's reporting facilities to create an output file say in Excel format that contains the fields in both folders that are needed for your letter. This file is then used by Word for its standard Mail Merge type operation.



When the report is run it creates for example a file called MailList.xls. Word is then opened, and a Mail Merge document setup to use this data file as its input source.



Within Word you select the file using the Mail Merge Wizard:



You then insert Merge Fields, and mail merge to your target list using standard Word functionality.

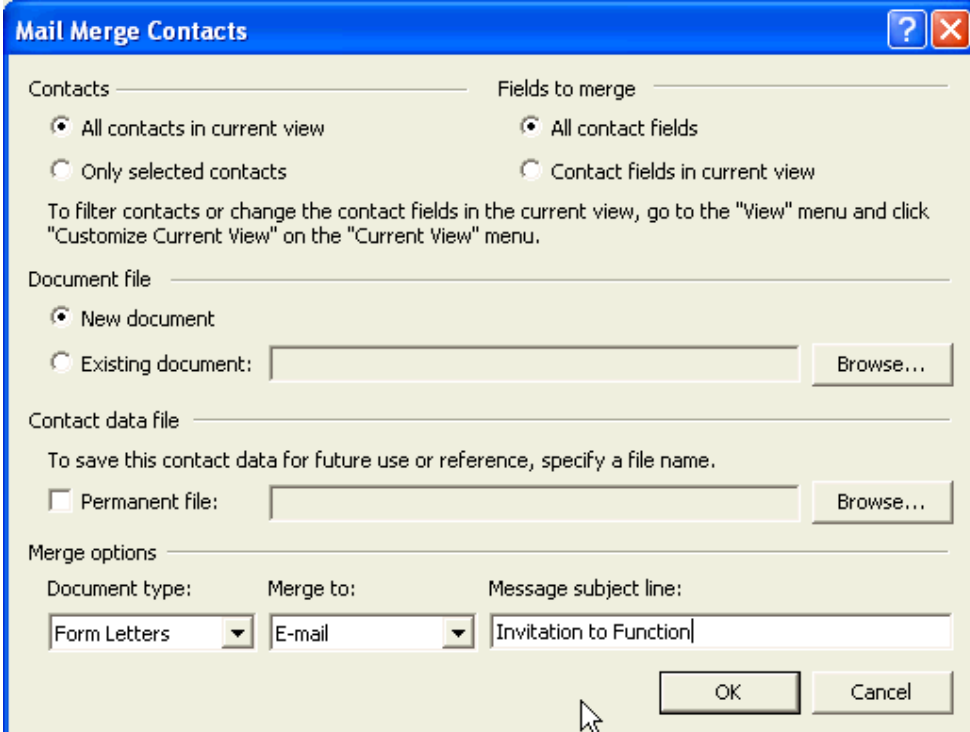
2.4 Direct e-Mail

2.4.1 Distribution Lists

The standard Distribution List functionality available in Outlook is used to create subsets of contacts to be used for e-mail. One e-mail may then be sent to a Distribution List.

2.4.2 Mail Merge

You can use the standard Outlook Mail Merge function to send a customized email to a selected group of contacts. You create a standard Mail Merge Word document, and insert the required Merge fields.



The screenshot shows the "Mail Merge Contacts" dialog box. It is divided into several sections:

- Contacts:** Two radio buttons: "All contacts in current view" (selected) and "Only selected contacts".
- Fields to merge:** Two radio buttons: "All contact fields" (selected) and "Contact fields in current view".
- Document file:** A section with a "New document" radio button (selected) and an "Existing document:" label followed by a text box and a "Browse..." button.
- Contact data file:** A section with a "Permanent file:" checkbox (unchecked) and a text box followed by a "Browse..." button.
- Merge options:** Three fields: "Document type:" with a dropdown menu showing "Form Letters", "Merge to:" with a dropdown menu showing "E-mail", and "Message subject line:" with a text box containing "Invitation to Function".

At the bottom right, there are "OK" and "Cancel" buttons.

2.5 Word Mail Merge

You can also use the Word Mail Merge facility for multi-folder target lists using the same facility described in Section 2.3.

3 Event Management

This module deals with the management of events and functions and the scheduling of function-related tasks.

3.1 Events/Functions

3.1.1 Event Types

The following types of events are catered for:

- Training Course:
 - Course Name, Type, etc.
 - Venue Details
 - Lecturer Details
 - Attendee Details
 - Payment Details

- Golf Day
 - Course Name, Type, etc.
 - Costs incurred
 - Venue Details
 - Client/Attendee Details (Handicap, etc.)

- Client Function (Breakfast, Dinner, Party, etc.)
 - Function Details
 - Costs incurred
 - Venue Details
 - Client/Attendee Details
 - Seating Arrangements

- Seminar
 - Seminar Details
 - Costs incurred
 - Venue Details
 - Client/Attendee Details
 - Travel & Accommodation Details

3.1.2 Event Details

There are many details associated with an event, starting with the Event Details Form:

The screenshot shows the 'Event Details' form in a software application. The window title is 'Untitled - Event'. The menu bar includes 'File', 'Edit', 'View', 'Insert', 'Format', 'Tools', 'Actions', and 'Help'. The toolbar contains icons for 'Save And Close', 'Print', 'Copy', 'Paste', 'Undo', 'Redo', and other standard functions. The form has three tabs: 'General' (selected), 'Auto Task Creation', and 'Mail Merge'. The 'General' tab contains the following fields:

- Event Name:
- Event Type:
- Function Type:
- Status:
- Type:
- Venue:
- Start Date:
- Start Time:
- End Date:
- End Time:

Below the form fields is a navigation bar with tabs for 'Notes', 'Companies', 'Contacts', 'Users', 'Costs', 'Appointments', 'Tasks', 'Journals', 'Documents', 'E-Mail', and 'Campaigns'. A large text area for notes is visible below the navigation bar.

The Event Details form shows the following:

- Event Name
- Event Type: Conference, Golf Day, Seminar, Training Course
- Function Type: External, Internal
- Status
- Venue
- Type
- Start Date / Time
- End Date / Time

3.1.3 Attendees

The screenshot shows a software window titled "Untitled - Event to Contact Association". It has a menu bar with "File", "Edit", "View", "Insert", "Tools", "Actions", and "Help". Below the menu is a toolbar with icons for "Save And Close", "Print", "Refresh", "Undo", "Redo", "Zoom In", "Zoom Out", and "Home". The main area has three tabs: "General" (selected), "Travel & Accommodation", and "Payment Details".

Under the "General" tab, there are several input fields:

- Event:** A dropdown menu with "Del Server Certification Course" selected.
- Contact:** A dropdown menu.
- Job Title:** A dropdown menu.
- Company:** A dropdown menu.
- Role:** A dropdown menu.
- Status:** A dropdown menu.
- Venue:** A dropdown menu.
- Room:** A text input field.
- Topic:** A text input field.
- Seat Allocation:** A text input field.
- Notes:** A large text area.

This reflects the contacts that have been invited to the function and their current status, namely Accepted, on the Waiting List etc.

The Association to that Contact also shows the following:

The screenshot shows the same software window, but with the "Travel & Accommodation" tab selected. The "Event" and "Contact" fields are still visible at the top.

The "Travel Arrangements" section includes:

- Mode of Transport:** A dropdown menu.
- Arrival Date:** A date picker set to 23/11/2005.
- Departure Date:** A date picker set to 23/11/2005.
- Car Hire:** A checkbox.
- Hire Company:** A dropdown menu.
- Other Details:** A text input field.

The "Transport Details" section includes:

- Date:** Two dropdown menus, both set to "None".
- Travel Code:** A text input field.
- Departure Time:** Two time pickers, both set to 11:32:06 AM.
- Arrival Time:** Two time pickers, both set to 11:32:06 AM.

The "Accommodation Details" section includes:

- Venue:** A dropdown menu.
- Arrival Date:** A date picker set to 23/11/2005.
- Departure Date:** A date picker set to 23/11/2005.
- Room No.:** A text input field.
- Room Type:** A dropdown menu.
- Sharing With:** A dropdown menu.
- Dietary Requirements:** A dropdown menu.
- Special Requirements:** A large text area.

- Travel and Accommodation Details

- Venue
- Arrival Date
- Departure Date
- Room No
- Room Type (Single, Double, Family, Paraplegic, Sharing etc)
- Sharing With
- Special Requirements (sea facing etc)
- Dietary Requirements
- Event Seat Allocation

Untitled - Event to Contact Association

File Edit View Insert Tools Actions Help

Save And Close

General Travel & Accommodation **Payment Details**

Event: Dell Server Certification Course Contact:

Payment Method: Currency:

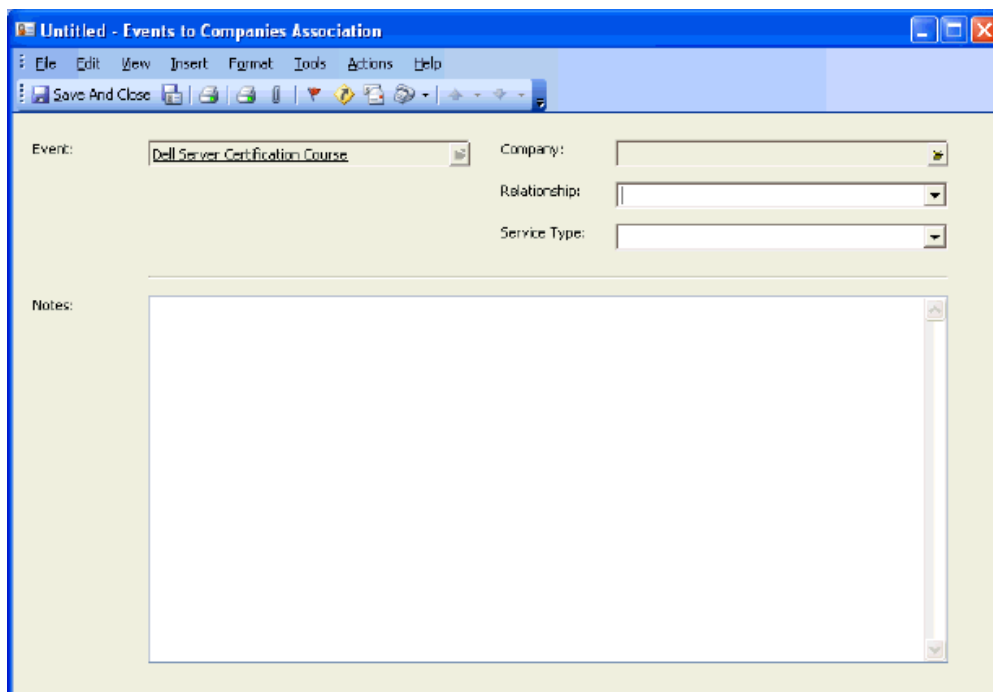
Card Type: Amount Due: 0.00

Number: Amount Paid: 0.00

Expiry Date: 23/11/2005 Balance: 0.00

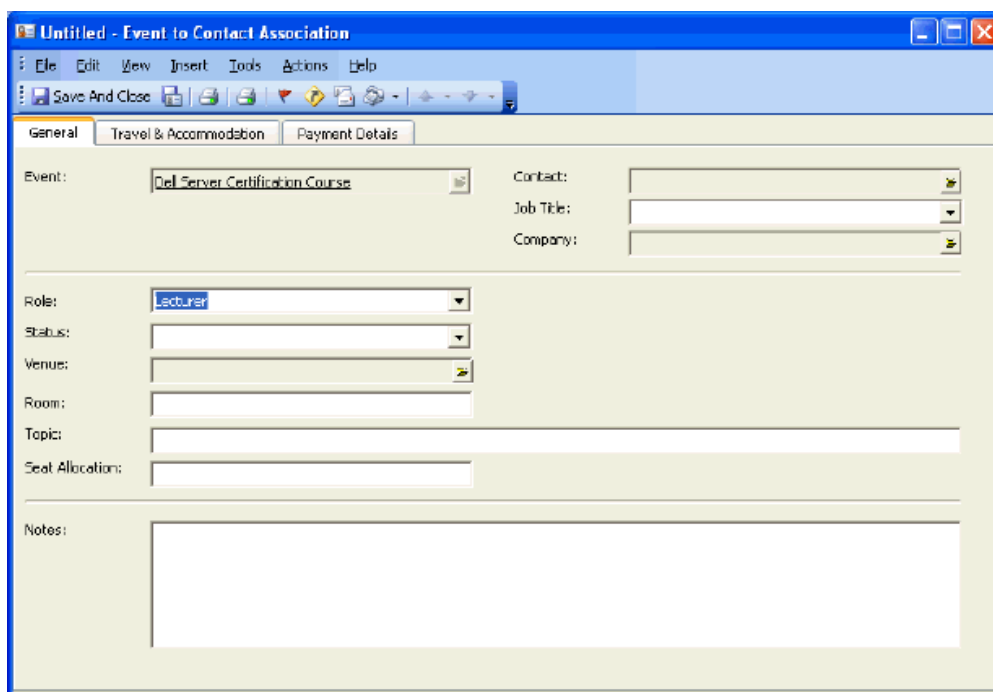
- Payment Details
 - Payment Method
 - Credit Card Type
 - Card Number
 - Expiry Date
 - Currency
 - Amount Due
 - Amount Paid
 - Balance

3.1.4 Suppliers/Sponsors



The standard Associated Companies folder can be used to store details of Supplier companies.

3.1.5 Speakers/Lecturers



This reflects the contacts that have been invited to speak / lecture at the function.

The Association to that Contact will also show the following:

- Venue
- Room
- Seminar / Lecture Topic
- Travel & Accommodation Arrangements – Travel & Accommodation Tab
 - Flights
 - Car Hire
 - Other
 - Venue
 - Room No
 - Room Type (Single, Double, Family, Paraplegic, Sharing etc)
 - Dietary Requirements
 - Other Requirements (sea facing etc)

The standard Contacts folder can be used to store details of Lecturers and Speakers.

3.1.6 Costing

The screenshot displays the 'Event Cost' application window. The interface includes a menu bar (File, Edit, View, Insert, Tools, Actions, Help) and a toolbar with icons for Save, Print, and other functions. The main form is divided into several sections:

- Event Information:** Fields for Event, Cost Description, Cost Type, and Status.
- Supplier Information:** Fields for Supplier, Supplier Contact, Internal Contact, Cost Centre, Order Date (set to 23/11/2005), P/O Number, and Invoice Number.
- Cost Details:** A section for tracking costs with fields for Currency, Budgeted Cost, Actual Cost, Deposit, Additional Payment, Amount Paid, and Outstanding Balance, all showing 0.00. It also includes Deposit Due Date and O/B Due Date (both set to 23/11/2005).
- Cancellation Details:** Fields for Cancellation Date (23/11/2005), Cancellation Fee (0.00), and Refund (0.00).

The costs incurred are tracked for the function, namely:

- Cost Description
- Cost Type
- Status
- Vendor/Supplier and Contact Details
- Internal Contact
- Cost Centre/Cost Code
- Order Date
- P/O Number
- Invoice Number
- Cost Details
 - Currency
 - Budgeted Cost
 - Actual Cost
 - Amount Paid (auto calculated ? - Deposit + Additional Payment)
 - Amount Due (automatically calculated)
 - Refund
 - Deposit
 - Additional Payment
 - Cancellation Cost
 - Days for Reminder
 - Cancellation Due Date

A facility for budgeting will eventually be included to compare actual figures against budget. Various reports by client and function will be available. The cost per attendee will be calculated.

3.1.7 Response/Attendance Tracking

This facility records a client's attendance history which will reflect, function, acceptance (yes/no) and his attendance or where he has sent a colleague as a substitute.

3.1.8 Tasks

Tasks can be linked to an event and assigned to internal staff members responsible for carrying out the task. This is handled via the standard Outlook Task functionality but with links to the Event.

3.1.9 E-Mail

All outbound and incoming e-mail will be linked to both the respective Companies/Contacts as well as the Event.

3.1.10 Documents

Documents of any type (Word, Excel, PowerPoint, etc.) can be linked to a Event for Itineraries, Maps, etc. This will also allow for Document templates to be sent to groups of contacts at a certain status, e.g reminder letters, etc.

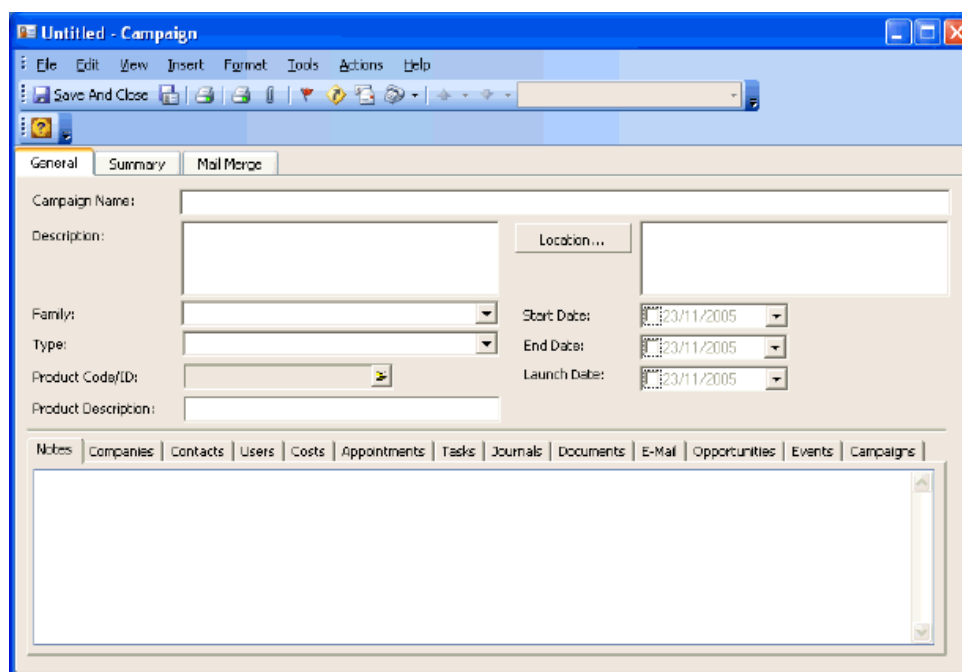
4 Campaign Management

The Campaign Management Module sets out the objectives of a marketing campaign such as a series of advertisements and tracks the progress and results of the campaign in terms of responses received, sales made, etc.

4.1 Campaign Details

There are many details associated with a campaign, starting with the Campaign Details Form:

4.1.1 Campaign Details



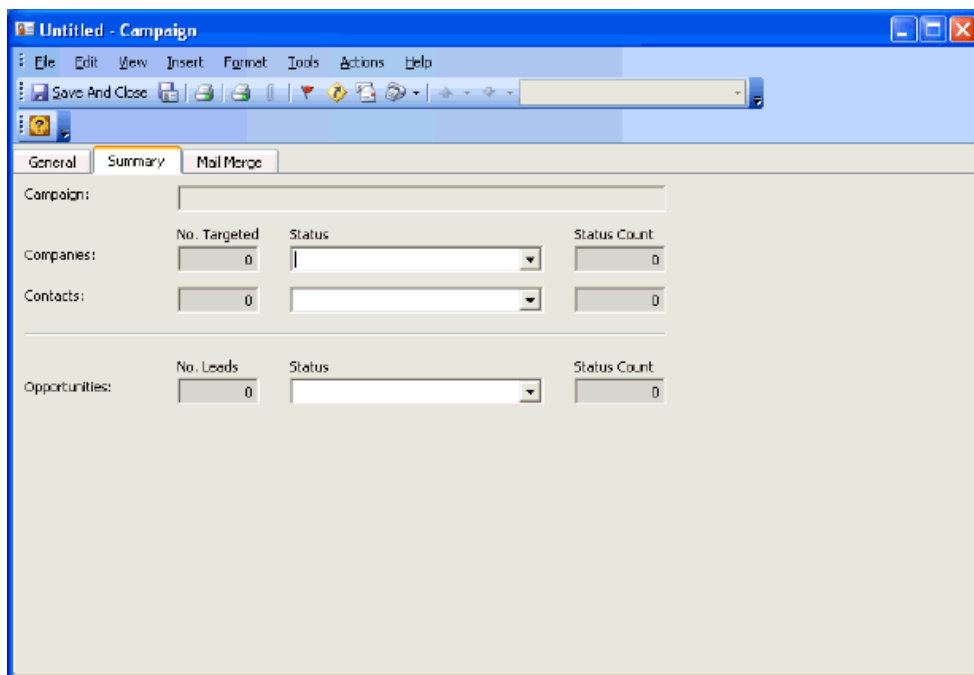
The screenshot shows a software window titled "Untitled - Campaign". The window has a menu bar with "File", "Edit", "View", "Insert", "Format", "Tools", "Actions", and "Help". Below the menu bar is a toolbar with various icons. The main area of the window is divided into tabs: "General", "Summary", and "Mail Merge". The "General" tab is active and contains the following fields:

- Campaign Name: [Text input field]
- Description: [Text input field]
- Location: [Text input field with "Location..." button]
- Family: [Dropdown menu]
- Type: [Dropdown menu]
- Product Code/ID: [Text input field with a search icon]
- Product Description: [Text input field]
- Start Date: [Date picker showing 23/11/2005]
- End Date: [Date picker showing 23/11/2005]
- Launch Date: [Date picker showing 23/11/2005]

At the bottom of the window, there is a horizontal menu with the following items: "Notes", "Companies", "Contacts", "Users", "Costs", "Appointments", "Tasks", "Journals", "Documents", "E-Mail", "Opportunities", "Events", and "Campaigns".

4.1.2 Summary

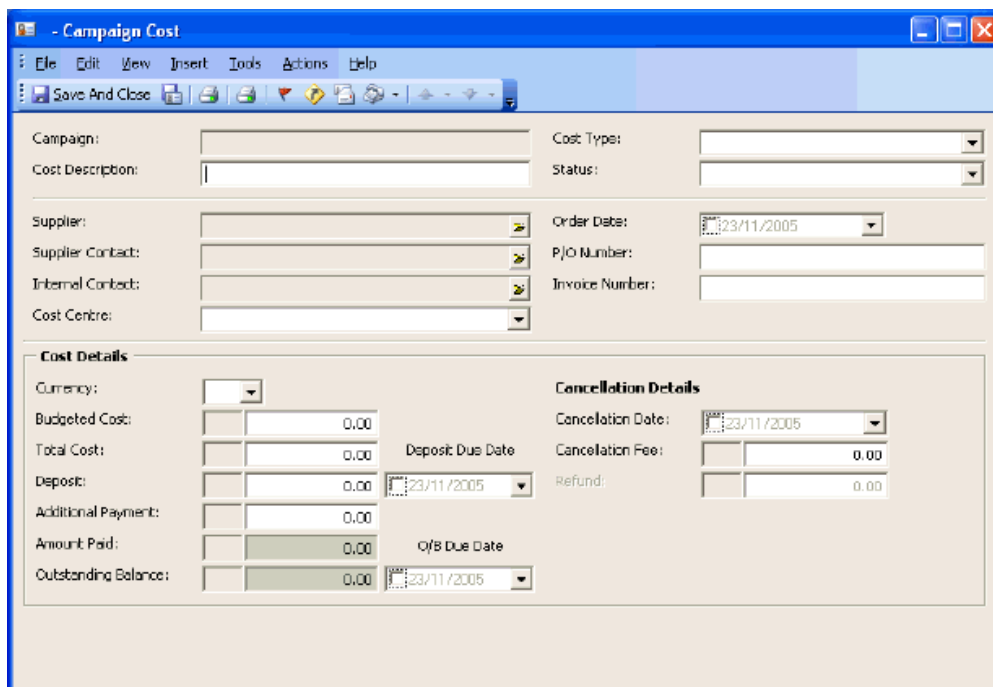
The Summary Tab summarises the number of Companies and Contacts targeted for each campaign as well as the number of Opportunity Leads received.



- No. Companies Targeted
- No. Contacts Targeted
- No. Leads

4.1.3 Costs

The costs incurred are tracked for the campaign, namely:



- Order Date
- Vendor/Supplier
- Type
- Amount
- P/O Number
- User
- Cost Centre/Cost Code

4.1.4 Associated Campaigns

One campaign can be linked to other associated or sub-campaigns.

4.1.5 Associated Events

Any campaign can be linked to an Event that is being scheduled as part of the Event Management Module.

4.1.6 Documents

A dropdown of available templates will be available from which any appropriate document may be created.

Documents may also be used to link any kind of attachment (Excel Spreadsheet, PowerPoint presentations, images, etc.) that are associated with the Campaign.

A Media Plan may be detailed in an attached Word document or Excel spreadsheet.

4.1.7 Associated Companies

The Associated Companies tab allows one to link any number of companies that are associated with this campaign in some way.

4.1.8 Associated Contacts

The Associated Contacts tab shows the contacts that are linked to the campaign. A facility exists to select a Group of Contacts as defined by a view that are then all linked to the campaign automatically in one operation, as opposed to selecting each contact individually.

4.1.9 Associated Users/Teams

The Associated Users tab shows the internal contacts (users and/or teams/departments) that are involved with this campaign.

4.1.10 Journals

The “Journals” tab will allow anyone to input a “history” record of the status of the Campaign and to make notes of unusual occurrences during a particular campaign. Journals are also used to record responses from individual Contacts when linked to a contact as well as to the campaign.

4.1.11 Tasks

Tasks can be linked to a Job and assigned to internal staff members responsible for carrying out the task. This is handled via the standard Outlook Task functionality but with links to the Campaign.

4.1.12 E-Mail

All outbound and incoming e-mail will be linked to both the respective Companies/Contacts as well as the Campaign.

4.1.13 Opportunities

Any opportunity that arises as a result of the campaign is linked to this campaign.

4.1.14 Orders

Any sales/orders that are generated as a result of the campaign are linked to this campaign.

4.1.15 Return on Investment Analysis

An ROI screen shows the cost vs results position of the campaign:

- Total Costs
- Value of Sales
- Cost per Order
- Total Revenue
- Cost per Revenue Unit

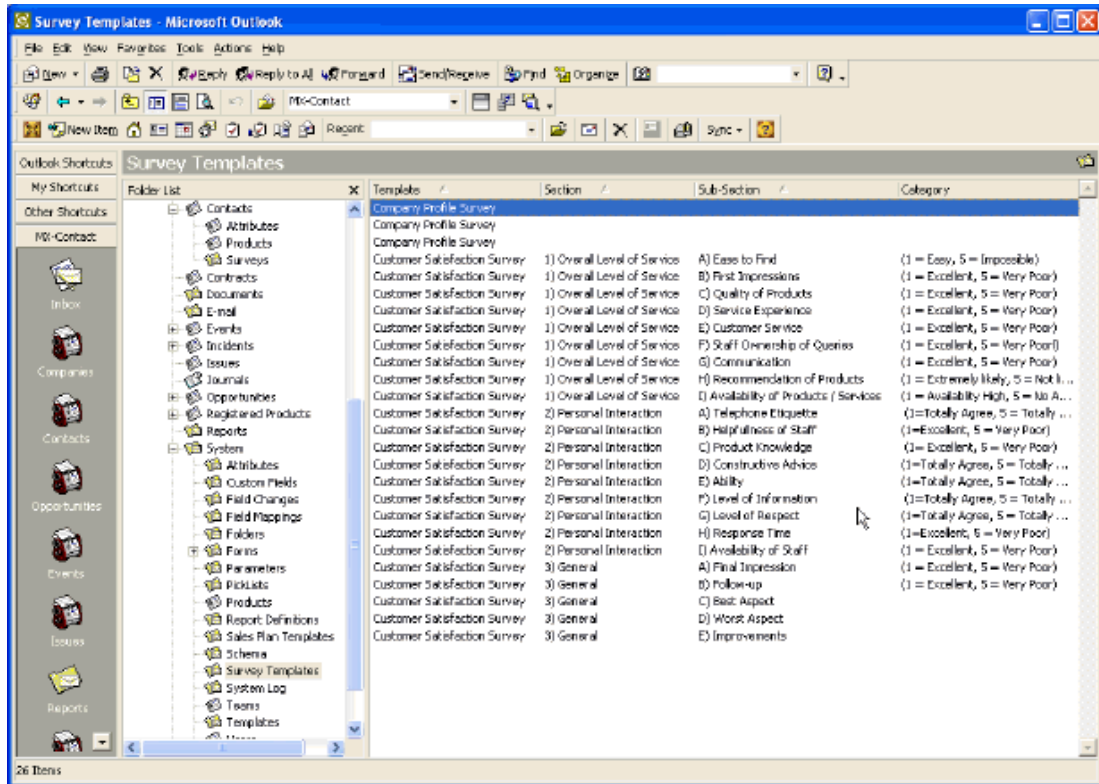
5 Surveys

The Surveys Feature of MX-Contact allows you to define templates of standard questions that need to be asked during a survey. So if a Customer Satisfaction Survey is conducted then the appropriate questions are mapped out in a sequence.

Surveys can also be used to gather information about a company or contact. The responses given by the client can then automatically update the relevant database fields for that company or contact.

5.1 Survey Templates

A folder exists in which the template of questions that relate to a survey can be defined. Some typical survey templates are provided as standard within MX-Contact.



Each question that forms part of a particular survey is created as an individual item in the folder:

Survey 00001 - Survey Template

File Edit View Insert Tools Actions Help

Save And Close Print Copy Paste Undo Redo Find Help Exit

Subject: Survey 00001

Folder: [Dropdown]

Template: [Dropdown]

Section: [Text Box]

Sub-Section: [Text Box]

Category: [Text Box]

Sub-Category: [Text Box]

Question: [Large Text Area]

Response: [Dropdown]

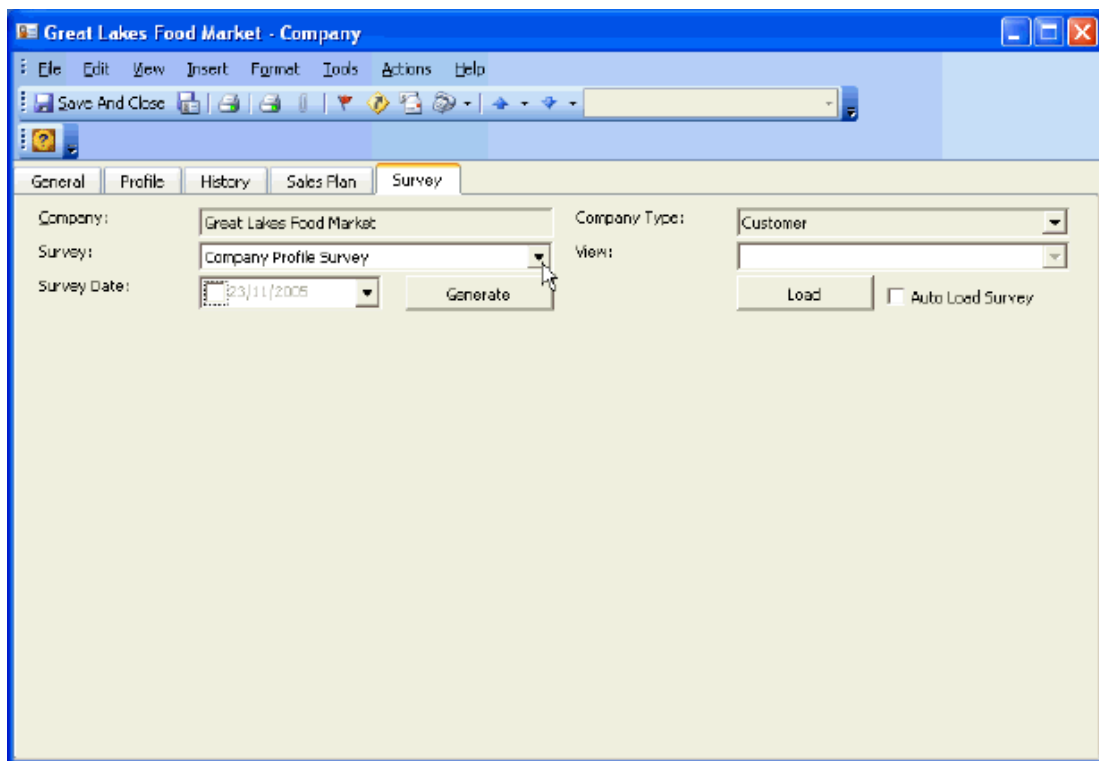
Name of picklist to use: [Text Box] (IF response = Combo Box then enter the name of the picklist that contains the combo box values)

Auto Update Field:

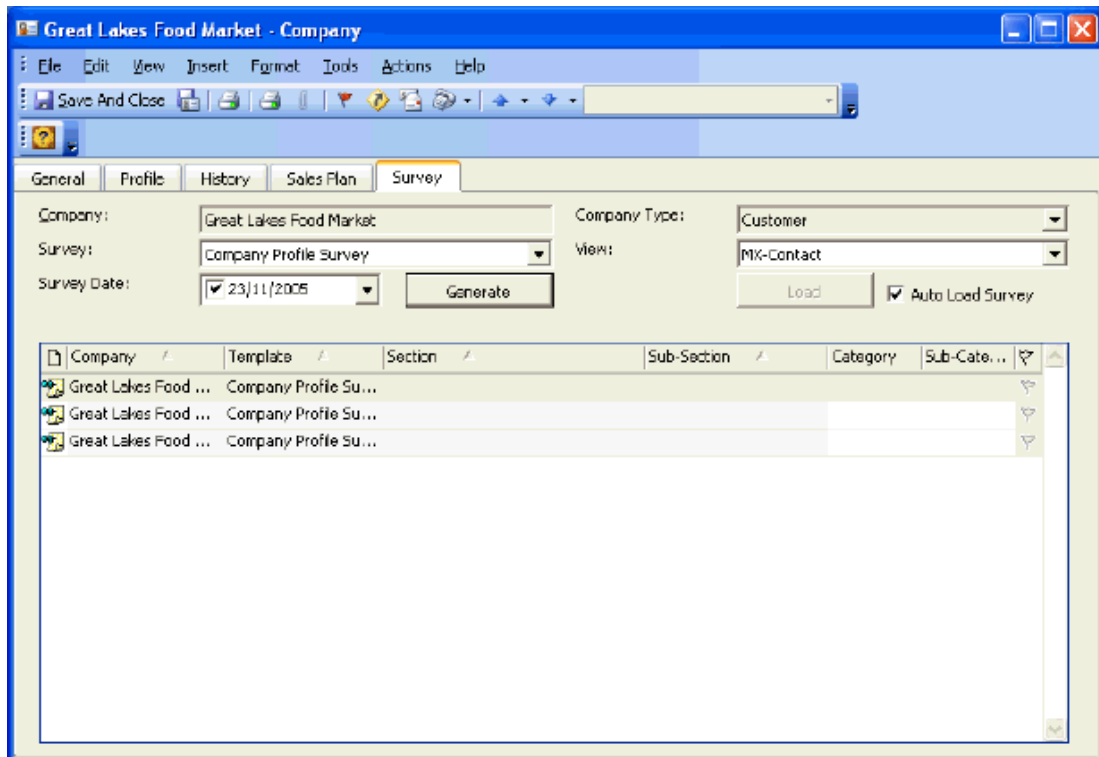
Field Name to Update: [Dropdown]

5.2 Company Surveys

A tab exists on the Company Form called **Survey**:



When a survey is to be conducted the relevant survey is selected from the dropdown list, and the date of the survey recorded. Clicking on **Generate** then creates the set of questions from the Survey Template but linked specifically to that company.



As each question is asked (and answered), the response is keyed into the Notes section of the Survey form. As mentioned previously if the response related to a database field then this field can be updated automatically from the response entered.

